

# The Sales Pulse: Managing Through Activities

Sugar Sell Foundations Webinar Series

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## Today's Agenda

- Why activity tracking matters
- Calls, Meetings, Notes, Tasks, Emails, and Messages in Sugar
- Activity tracking best practices
- Using Sugar Connect
- One-click activity tracking
- Dashboards, reports & coaching
- Q&A

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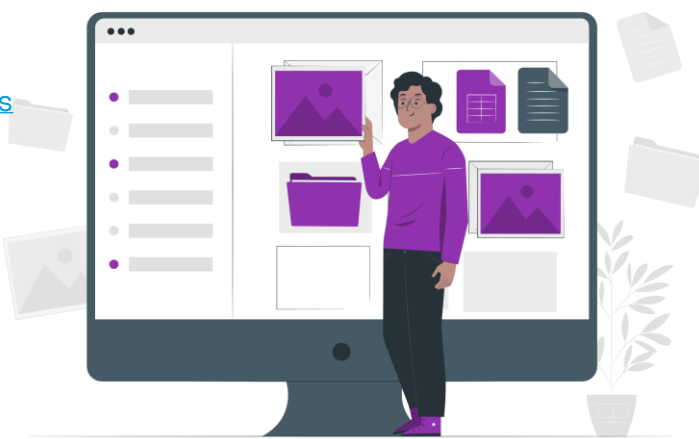


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# Resources

- [Sugar Application Guide > Calls](#)
- [Sugar Application Guide > Meetings](#)
- [Sugar Application Guide > Notes](#)
- [Sugar Application Guide > Tasks](#)
- [Sugar Connect User Guide](#)
- [SugarLive Message Records](#)

- [SugarLive User Guide](#)
- [Calendar](#)
- [Creating Action Buttons](#)
- [Last Interaction Field](#)



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# Why Activity Tracking Matters

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# Why Activities Matters

**Activities = Engagement. Movement. Momentum.**

- Show customer interaction history
- Enable meaningful coaching
- Improve forecasting accuracy
- Prevent follow-up gaps
- Drive deal progression

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# What Happens Without Activity Tracking



No visibility into rep effort



Missed follow-ups



Inaccurate pipeline assumptions

Coaching becomes guesswork



Deals slow or stall



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# Calls, Meetings, Notes, Tasks, Emails, and Messages in Sugar



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## Sugar Activity Types



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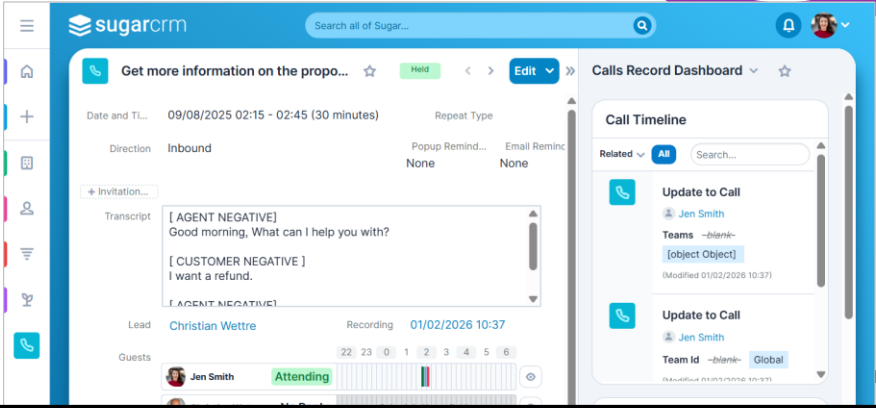

# Calls: When & Why

Use **Calls** for:

- Phone conversations
- Call attempts or voicemails
- Scheduled or completed calls

**Key fields:**

- Direction
- Status
- Internal Notes
- Guest



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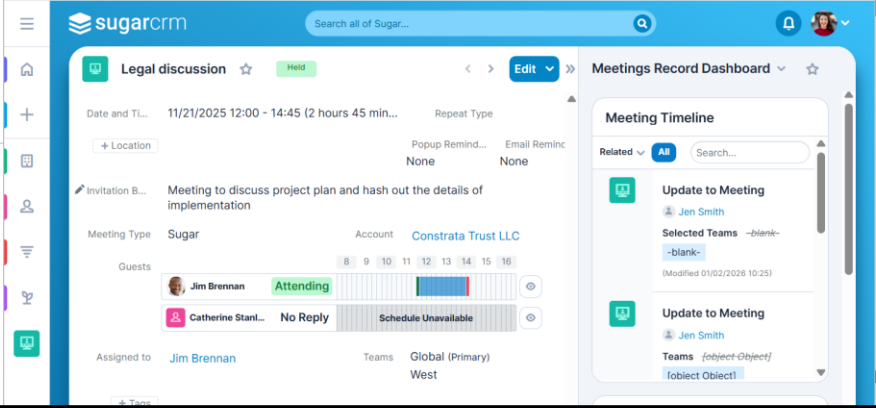

# Meetings: When & Why

Use **Meetings** for:

- Scheduled demos
- Discovery sessions
- Zoom/Teams calls
- Any interaction requiring a date/time

**Key fields:**

- Repeat Type
- Location
- Internal Notes
- Guest



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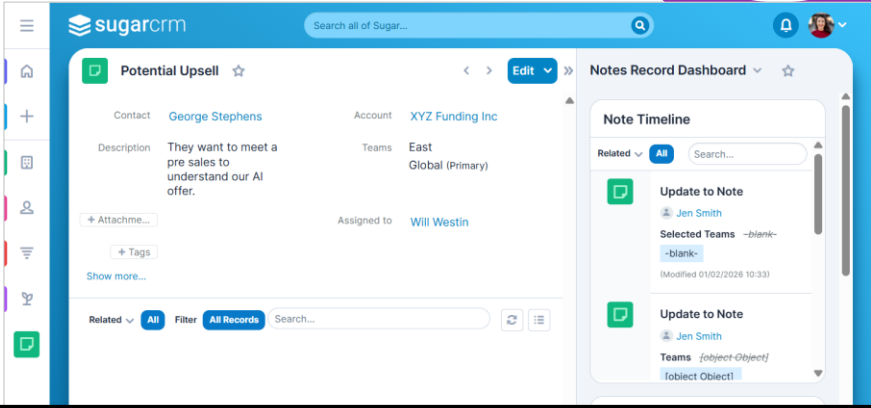
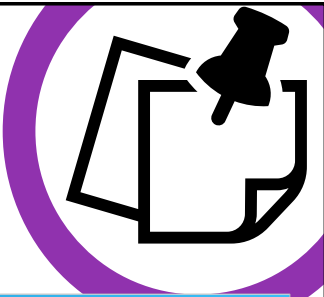
## Notes: When & Why

Use **Notes** for:

- Information that doesn't have a due date
- Important info about the related record (like a contact) that's not a call or meeting

**Key fields:**

- Description
- Attachment



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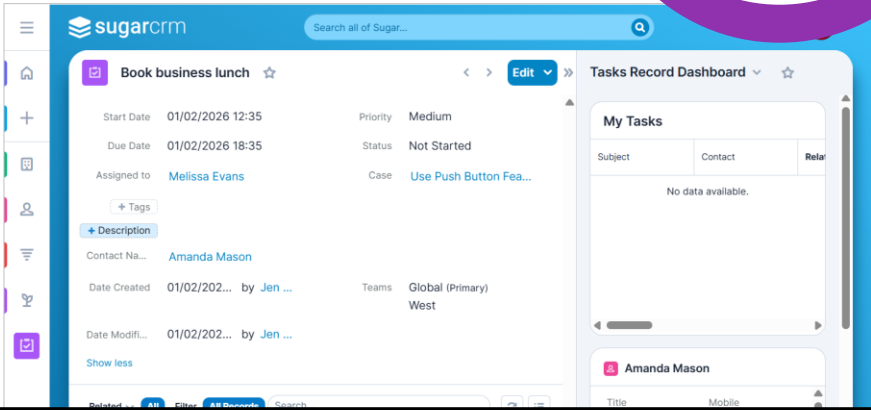

## Task: When & Why

Use **Tasks** for:

- Follow-ups
- To-dos that aren't meetings/calls
- Internal reminders or to-do's

**Key fields:**

- Start and End Dates
- Status
- Priority
- Description



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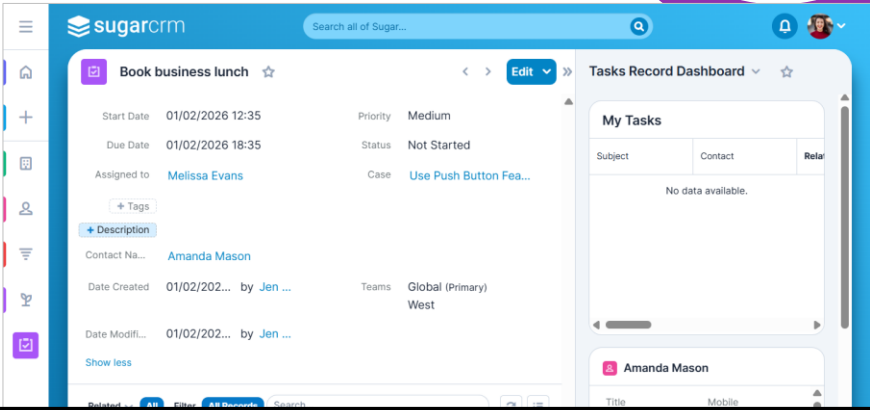

## Email Tracking (via Sugar Connect)

Use **Sugar Connect Email Tracking** for:

- Automatically capture inbound/outbound emails
- Link emails to Leads, Contacts, Accounts, Opportunities
- No manual data entry required

**Other Options:**

- Sugar Email Client
- External Email
- Clients
- Composing and Sending Outbound Emails
- Email Campaigns
- Email Templates
- Integration with DocuSign



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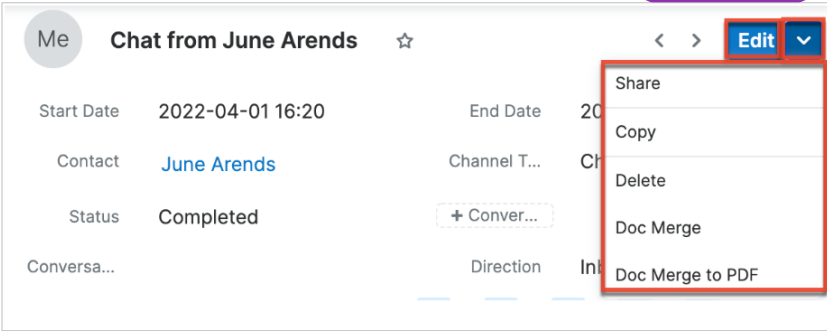
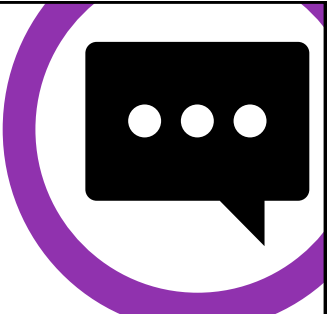
## Messages: When & Why

Use **Messages** for:

- For customers using SugarLive
- Represent historical records of instant messaging chat
- New message record containing the chat transcript

**Key fields:**

- Related to (flex-rate field type – module and record that is related to this message)
- Guests (participants in the conversation)
- Conversation (transcript)



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# Using Tracking Best Practices

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## Decision Guide: What Should I Log?

Interaction	Type of Record
Phone interaction?	Log or schedule a Call
Gathering Group of People Discussion (Virtual or In-Person)	Create a Meeting
Attach a file or additional information to a record in Sugar	Create a Note
Follow-up needed?	Create a Task
Email sent/received?	Logged via Connect
Use SugarLive Chat to communicate with clients?	A Message Record is automatically created

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## Making Activity Logging Easy

Tools that streamline tracking:

- Subpanels

The screenshot displays the SugarCRM interface for a contact named Stephanie Henry. The main record shows fields for Title (Mgr Operations), Department (Operations), Account Name (X-Sell Holdings), and Email Address (stephanie.henry@yahoo.com). Below the record, there are subpanels for 'Calls (1-5 of 6+)', 'Meetings (4)', and 'Messages'. A 'Quick Create' button is visible in the top right corner of the subpanels area.

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## Making Activity Logging Easy

Tools that streamline tracking:

- Subpanels
- Quick Create

The screenshot shows the SugarCRM interface with the 'Quick Create' dropdown menu open. The menu lists various entities and activities that can be created: Account, Contact, Case, Opportunity, Lead, Document, Email, Log Call, Schedule Meeting (highlighted), Task, and Note. The background shows a list of contacts.

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## Making Activity Logging Easy

Tools that streamline tracking:

- Subpanels
- Quick Create
- **Timeline** view

The screenshot displays the SugarCRM interface for a contact named Linda Holiday. The main contact card shows her title as 'Recruiting Manager', department as 'Human Resources', and email as 'linda.holiday@yahoo.com'. Below the contact card are two subpanels: 'DD Furniture Inc' and 'Purchase History'. The 'Timeline' view is highlighted with a purple border, showing a list of activities including 'Schedule training', 'Confirm next onsite meeting', and 'Workshop with a Sales Engineer'. The 'Purchase History' subpanel shows a table of purchases with columns for purchase name, date, quantity, and total.

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## Making Activity Logging Easy

Tools that streamline tracking:

- Subpanels
- Quick Create
- Timeline view
- **Action Buttons**

The screenshot displays the SugarCRM interface for a contact named Justin Johns. The main contact card shows his title as 'President', website as 'http://www.otcholdings.com', and email as 'justin.johnston@gmx.com'. Below the contact card are two subpanels: 'BUSINESS CARD' and 'SHOW MORE'. The 'Action Buttons' section is highlighted with a green border, showing buttons for 'Initial Call', 'Demo Meeting', and 'First Intro Email'. The 'BUSINESS CARD' subpanel shows a table of business cards with columns for business card name, date, quantity, and total.

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## Making Activity Logging Easy

**Tools that streamline tracking:**

- Subpanels
- Quick Create
- Timeline view
- Action Buttons
- **Sugar Connect** syncing

Meeting

30 Minute Meeting Scheduled, 2024-05-14 16:00

Business Card

Date and Time  
2024-05-14 16:00

Repeat Type  
None

Invitation Body  
30 Minute Meeting

View in Sugar

Edit Entry

Refresh

Enable Sync

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## Making Activity Logging Easy

**Tools that streamline tracking:**

- Subpanels
- Quick Create
- Timeline view
- Action Buttons
- Sugar Connect syncing
- **Last Interaction** field on account records

Diversified Energy Inc

BUSINESS CARD

Website <http://www.dei.co.uk>

+ Member of

+ Business Center...

Assigned to Christine Oliver

+ Tags

Last Interaction 03-11-2025 Introduce all players

Industry Energy

Type Customer

Service Level Tier 1

Office Phone (311) 555-1234

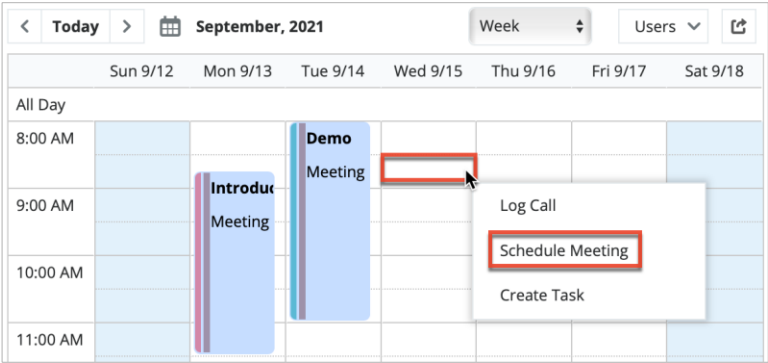
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## Making Activity Logging Easy

**Tools that streamline tracking:**

- Subpanels
- Quick Create
- Timeline view
- Action Buttons
- Sugar Connect syncing
- Last Interaction field on account records
- **Calendar**



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## Suggested Calendar Admin Quick Setup

- Create a role [Admin>Role Management]
  - Set the **Calendar** Module permissions to :
    - Access: Enabled
    - Access Type: Normal
    - Edit & Delete: Owner
    - List & Record View: All

Access	Access Type	Delete	Edit	Export	Import	List	Mass Update	Record View
Enabled	Normal	Not Set	Owner	Owner	Not Set	All	Not Set	All

- Add all calendar users to this role in Users panel

**Results:** Users can view team calendars but **only** edit or delete their own calendar

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# One-click Activity Tracking

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## Action Buttons for 1-click Logging

Examples:

- “Log a Call”
- “Schedule Follow-Up”
- Auto-populated activity records

**Benefits:** Fast · Consistent · Accurate

Lead Action Buttons



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## Working in Sugar: Best Practices

- Log activities in context using subpanels
- Use Quick Create for speed
- Review Timeline before reaching out
- Keep outcomes & purpose fields updated

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## Sugar Connect: Calendar & Email Sync

- Sync meetings from Outlook/Gmail
- Log emails to Sugar directly from inbox
- Add new Contacts/Leads from email
- Auto-capture meeting invites & reminders

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## Daily “Workflow” Example

1. Receive email from prospect → auto-logged
2. Schedule discovery call → synced Meeting
3. Hold call → log Call outcome
4. Create Task for follow-up
5. Manager reviews activity history in dashboard

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## Dashboards, Reports, & Coaching

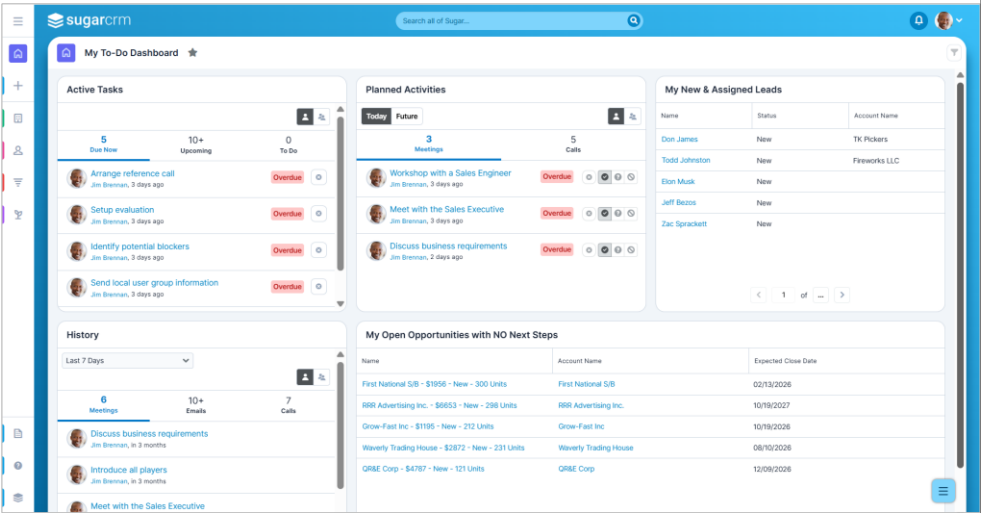
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# Dashlets on Dashboards for Reps

- My Activities
- Upcoming Meetings/Calls
- Recent Communications
- Opportunity with no Next Steps



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# Dashboards for Managers: What to Look for

- Activity Gaps**  
Opportunities with little or no recent engagement
- Aging Activities**  
Long gaps between customer interactions
- Follow-Up Discipline**  
Clear next steps after calls and meetings
- Activity Balance**  
Healthy mix of Calls, Meetings, Emails and Tasks
- Activity → Pipeline Movement**  
Engagement that drives stage progression

**Key mindset:** Look for patterns—not just volume

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# Reports for Operational Insight

- Calls by Outcome (Connected – Productive, Connected – Not Interested, Left Voicemail, No Answer, Follow-Up Scheduled, Demo Booked, Disqualified)
- Meetings by Type (Live, Sugar, Teams, Zoom)
- Weekly Activity Summary by Rep
- Activity → Pipeline movement
  - In Sugar, this is often built by:
    - Linking **Activities** → **Opportunities**
    - Tracking **stage change date**
    - Using **Activity Outcome** as a grouping dimension
    - Optionally layering **SugarBPM** triggers for “stage advanced within X days of activity”

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# Embedding Activities Into Coaching

- Review patterns in weekly 1:1s
- Discuss quality of conversations
- Assess follow-up discipline
- Identify skill gaps

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# Key Takeaways and Q&A

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## Key Takeaways

- Activities drive **visibility & accountability**
- Calls, Meetings, Notes, Tasks, Emails, and Messages each serve distinct **roles**
- Sugar Connect **eliminates manual steps**
- Action Buttons make **tracking effortless**
- Dashboards & reports **operationalize the process**

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# Questions?

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# Next in Series

[Jan 13: Sugar on the Go: Mobile Selling Made Easy](#)

[Jan 20: Less Busywork, More Selling - Automating Your Sugar Workflows](#)

[Jan 27: Sales Mastery: Driving Growth with Sugar](#)



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